

State of Texas  
Records Retention Schedule

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Automated Facsimile of SLR-105

2. AGENCY CODE: 537

3. AGENCY: TEXAS DEPARTMENT OF STATE HEALTH SERVICES

4. Records

Series Item # 5. Agency  
Item #

6. Records Series Title

7. RETENTION PERIOD

Agency

Storage

Total

8. Archival

9. Remarks

\_\_\_ ORIGINAL SUBMISSION

\_\_X\_\_ RECERTIFICATION

\_\_\_ REPLACEMENT PAGE

\_\_\_ ADDENDUM PAGE

10. 106 No.

| 830 - INFORMATION TECHNOLOGY SECTION |      |  |      |  |      |   |  |  |  |
|--------------------------------------|------|--|------|--|------|---|--|--|--|
|                                      | 4575 | INTRANET PUBLICATIONS  | AV   |  | AV   |   |  |  |  |
| 1.1                                  |      | 5 LOG FILE REPORTS   | AV   |  | AV   |   |  |  |  |
| 1.1                                  |      | 1809 INTERNET APPLICATION FORMS  | US   |  | US   |   |  |  |  |
| 1.1                                  |      | 2095 PEOPLESOFT FILES/RECORDS  | 4    |  | 4    | A |  | Vital Record.  |  |
| 1.1.004                              |      | 1597 LEGISLATIVE APPROPRIATION REQUEST   | AC+6 |  | AC+6 | A |  | AC=SEPTEMBER 1 OF ODD-NUMBERED CALENDAR YEARS. ONLY COPIES OF SUPPORTING DOCUMENT SUBMITTED TO THE LEGISLATIVE BUDGET BOARD ARE ARCHIVAL.  |  |
| 1.1.007                              |      | 898 CORRESPONDENCE, ADMINISTRATIVE (LIMITED TO FORMULATION, PLANNING, IMPLEMENTATION, INTERPRETATION, MODIFICATION, OR REDEFINITION OF THE PROGRAMS, SERVICES OR PROJECTS & THE ADMINISTRATIVE REGULATIONS, POLICIES AND PROCEDURES THAT GOVERN THEM.) | 4    |  | 4    | R |  | Vital Record. ONLY ADMINISTRATIVE CORRESPONDENCE OF EXECUTIVE STAFF, BOARD OR COMMISSION MEMBERS, DIVISION DIRECTORS AND SECTION/UNIT/BRANCH HEADS REQUIRE ARCHIVAL REVIEW.                              |  |
| 1.1.008                              |      | 899 GENERAL CORRESPONDENCE (LIMITED TO DOCUMENTING THE ROUTINE OPERATIONS OF THE POLICIES, PROGRAMS, SERVICES OR PROJECTS.)  | 2    |  | 2    |   |  | INCLUDES SOME E-MAIL.  |  |
| 1.1.010                              |      | 1602 DIRECTIVES (DOCUMENTATION THAT OFFICIALLY INITIATES, RESCINDS OR AMENDS GENERAL OFFICE PROCEDURES.)   | US+1 |  | US+1 |   |  | (INITIATES, RESCINDS OR AMENDS GENERAL OFFICE PROCEDURES.)   |  |
| 1.1.013                              |      | 1605 CALENDARS, APPOINTMENT, AND ITINERARY RECORDS   | CE+1 |  | CE+1 | R |  | INCLUDES OUTLOOK CALENDAR. ONLY CALENDARS, APPOINTMENT, AND ITINERARY RECORDS OF EXECUTIVE STAFF, BOARD OR COMMISSION MEMBERS, DIVISION DIRECTORS AND SECTION/UNIT/BRANCH HEADS REQUIRE ARCHIVAL REVIEW. |  |
| 1.1.014                              |      | 837 LEGAL OPINIONS & ADVICE: OFFICE OF GENERAL COUNSEL/ATTORNEY GENERAL'S OFFICE   | AV   |  | AV   | R |  |  |  |

RETENTION CODES (Field 7)

AC - After Closed, Terminated,  
Completed, Expired, Settled

AV - As Long As Administratively  
Valuable

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LA - Life of Asset

MO - Months  
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ARCHIVAL CODES (Field 8)

VITAL Record (Include in Field 9)

A - Transfer to State Archivist  
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Series Item # 5. Agency Item # 6. Records Series Title 7. RETENTION PERIOD Agency Storage Total 8. Archival 9. Remarks 10. 106 No.

830 - INFORMATION TECHNOLOGY SECTION

|         |      |   |      |  |      |   |  |
|---------|------|---|------|--|------|---|--|
| 1.1.020 | 67   | PUBLIC INFORMATION REQUESTS - NOT EXEMPTED      | AC+1 |  | AC+1 |   | AC=DATE REQUEST IS FULFILLED; INCLUDES WRITTEN REQUESTS FOR PUBLICATIONS (TEXAS GOVT CODE 552.002)   |
| 1.1.021 | 5148 | PUBLIC INFORMATION REQUESTS - EXEMPTED (DENIED) | AC+2 |  | AC+2 |   | AC=DATE OF DENIAL OF REQUEST.  |
| 1.1.023 | 1606 | ORGANIZATION CHARTS                             | US   |  | US   | A |  |
| 1.1.024 | 1607 | PLANS AND PLANNING RECORDS                      | AC+3 |  | AC+3 | R | Vital Record. DATA PROCESSING PLANNING RECORDS ARE NOT ARCHIVAL. AC=DECISION MADE TO IMPLEMENT OR NOT TO IMPLEMENT RESULT OF PLANNING PROCESS  |
| 1.1.038 | 1618 | CUSTOMER SURVEYS                                | AC   |  | AC   |   | AC=FINAL DISPOSITION OF SUMMARY REPORT. (SURVEYS CANNOT BE DESTROYED UNTIL SUMMARY REPORT HAS BEEN SENT TO STATE ARCHIVIST AT THE END OF THE RETENTION PERIOD.) SEE 1.1.067 FOR SUMMARY REPORTS COMPILED FROM CUSTOMER SURVEYS.                            |
| 1.1.043 | 1620 | TRAINING MATERIALS                              | US+1 |  | US+1 |   |  |
| 1.1.048 | 5781 | LITIGATION FILES                                | AC+1 |  | AC+1 | R | AC=AS APPLICABLE, DECISION OF AN AGENCY NOT TO FILE A LAWSUIT OR DECISION THAT A LAWSUIT WILL NOT BE FILED AGAINST IT ON A MATTER; DISMISSAL OF A LAWSUIT FOR WANT OF PROSECUTION OR ON MOTION OF THE PLAINTIFF; OR FINAL DECISION OF A COURT IN A LAWSUIT |
| 1.1.055 | 77   | INFORMATION RESOURCES STRATEGIC PLAN            | AC+6 |  | AC+6 | A | AC=SEPT 1 OF ODD-NUMBERED CALENDAR YEARS. ARCHIVAL REQUIREMENT MET BY SENDING REQUIRED COPIES OF COMPLETED AGENCY PLAN TO TEXAS STATE DEPOSITORY PROGRAM.  |
| 1.1.055 | 1466 | BIENNIAL OPERATING PLAN FILES                   | AC+6 |  | AC+6 | A | AC=SEPT 1 OF ODD-NUMBERED CALENDAR YEARS. ARCHIVAL REQUIREMENT MET BY SENDING REQUIRED COPIES OF COMPLETED AGENCY PLAN TO TEXAS STATE DEPOSITORY PROGRAM.  |

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| 830 - INFORMATION TECHNOLOGY SECTION |      |   |      |  |      |   |   |  |  |
|--------------------------------------|------|---|------|--|------|---|---|--|--|
| 1.1.055                              | 6731 | INFORMATION TECHNOLOGY DETAIL                       | AC+6 |  | AC+6 | A | AC=SEPT 1 OF ODD-NUMBERED CALENDAR YEARS. ARCHIVAL REQUIREMENT MET BY SENDING STRATEGIC PLAN TO TEXAS STATE PUBLICATIONS DEPOSITORY PROGRAM.  |  |  |
| 1.1.057                              | 904  | TRANSITORY INFORMATION                              | AC   |  | AC   |   | AC=PURPOSE OF RECORD HAS BEEN FULFILLED. INCLUDES CHAT ROOM CORRESPONDENCE, SOME OF WHICH MAY CONTAIN CONFIDENTIAL INFORMATION; AC=PURPOSE OF RECORD HAS BEEN FULFILLED. ALSO INCLUDES TELEPHONE MESSAGE NOTIFICATIONS & SOME E-MAIL CONTAINING ROUTINE INFORMATION USED FOR COMMUNICATION, BUT NOT FOR THE DOCUMENTATION OF A SPECIFIC AGENCY TRANSACTION. |  |  |
| 1.1.063                              | 901  | STAFF MEETING MINUTES AND NOTES                     | 1    |  | 1    |   |   |  |  |
| 1.1.065                              | 1616 | REPORTS AND STUDIES (NON-FISCAL) - RAW DATA         | AV   |  | AV   |   |   |  |  |
| 1.1.066                              | 1614 | REPORTS - BIENNIAL OR ANNUAL AGENCY (NARRATIVE)     | AC+6 |  | AC+6 | A | ARCHIVAL REQUIREMENT MET BY SENDING REPORT TO TEXAS STATE PUBLICATIONS DEPOSITORY PROGRAM.  |  |  |
| 1.1.067                              | 1613 | REPORTS & STUDIES (NON-FISCAL)                      | 3    |  | 3    | R | IF REPORT HAS HISTORICAL RELEVANCE, DO NOT DESTROY REPORT BUT SEND IT TO THE STATE ARCHIVIST AT THE END OF THE RETENTION PERIOD.  |  |  |
| 1.1.069                              | 1615 | REPORTS - EMPLOYEE                                  | 1    |  | 1    |   |   |  |  |
| 1.1.070                              | 1609 | AGENCY RULES, POLICIES & PROCEDURES - FINAL         | AC+3 |  | AC+3 | R | Vital Record. INCLUDES DIVISION ADMINISTRATIVE HANDBOOK & TWICES POLICIES AND PROCEDURES MANUAL. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.  |  |  |
| 1.1.071                              | 5736 | AGENCY RULES, POLICIES & PROCEDURES - WORKING FILES | AC+3 |  | AC+3 | R | Vital Record. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.   |  |  |

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830 - INFORMATION TECHNOLOGY SECTION

|         |   |      |      |   |  |
|---------|---|------|------|---|--|
| 1.3.001 | 5779 WEB PUBLICATIONS   | AC+2 | AC+2 |   | AC=UNTIL SUPERSEDED OR OBSOLETE. WEB PUBLICATIONS ARE MADE AVAILABLE ONLINE TO PUBLIC FOR AT LEAST SIX MONTHS. 13 TAC RULE 3.4(B). THEN RETAINED TO MEET THEIR RECORDS SERIES' RETENTION PERIOD OR THE PERIOD FOR PUBLICATIONS, WHICHEVER IS LONGER. REQUIRED NUMBER OF COPIES PRINTED AT HHS PRINTING ARE SENT TO CLEARINGHOUSE. IF OUTSIDE PRINTER, PROGRAM MUST SEND REQUIRED NUMBER OF COPIES TO HHS PRINTING FOR SUBMISSION TO CLEARINGHOUSE. |
| 1.3.002 | 5776 WEBSITE DEVELOPMENT FILES  | AV   | AV   | R | AV=PUBLICATION ON THE WEBSITE  |
| 2.0     | 2955 E-MAIL SERVER BACK-UP TAPES  | AC   | AC   |   | AC=USUALLY KEPT FOR AT LEAST SIX WEEKS, BUT NO LONGER THAN ONE YEAR, AND THEN REUSED.  |
| 2.0     | 5118 FILE SERVER BACK-UP TAPES  | AC   | AC   |   | AC=6 MONTHS, EXCEPT FOR THE FIRST WEEK OF EACH MONTH, JAN-AUG AND OCT-DEC, WHICH ARE RETAINED 15 MONTHS; THE FIRST WEEK IN SEPTEMBER TAPES ARE RETAINED 5 YEARS. MAY CONTAIN CONFIDENTIAL INFORMATION.   |
| 2.1.001 | 4976 DATA ENTRY ACCOUNTS AND PROGRAMS/AUTOMATED FILES, PROCESSING FILES, DATA ENTRY DOCUMENTS AND NOTES | AC   | AC   |   | Vital Record. AC=COMPLETION OF 3RD VERIFICATION CYCLE, OR AUDIT COMPLETION CONFIRMING SUCCESSFUL TRANSACTION PROCESSING, OR REQUIRED AUDIT TRAIL MAINTENANCE, OR THE ABILITY OT RESTORE OR MIGRATE WHEN ERRORS ARE DETECTED OR WHEN HARDWARE OR SOFTWARE CHANGES OCCUR.  |
| 2.1.002 | 4951 MASTER FILES - AUTOMATED FILES   | AC   | AC   |   | Vital Record. AC=COMPLETION OF 3RD VERIFICATION CYCLE, OR AUDIT COMPLETION CONFIRMING SUCCESSFUL TRANSACTION PROCESSING, OR REQUIRED AUDIT TRAIL MAINTENANCE, OR THE ABILITY OT RESTORE OR MIGRATE WHEN ERRORS ARE DETECTED OR WHEN HARDWARE OR SOFTWARE CHANGES OCCUR. FOLLOW RETENTION PERIOD APPROVED FOR THE EQUIVALENT TYPE OF TEXTUAL RECORD   |

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830 - INFORMATION TECHNOLOGY SECTION

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|---------|------|--|------|------|---|
| 2.1.007 | 70   | SOFTWARE PROGRAM AND JOB CONTROL LANGUAGE                  | AC   | AC   | Vital Record. AC=UNTIL ELECTRONIC RECORDS ARE TRANSFERRED TO AND MADE USABLE IN A NEW SOFTWARE ENVIRONMENT OR THERE ARE NO ELECTRONIC RECORDS BEING RETAINED TO MEET AN APPROVED RETENTION PERIOD THAT REQUIRE THE SOFTWARE TO BE RETRIEVED AND READ. 13 TAC 6.94                 |
| 2.1.008 | 1820 | HARDWARE DOCUMENTATION                                     | AC   | AC   | Vital Record. AC=UNTIL ELECTRONIC RECORDS ARE TRANSFERRED TO AND MADE USABLE IN A NEW HARDWARE OR THERE ARE NO ELECTRONIC RECORDS BEING RETAINED TO MEET AN APPROVED RETENTION PERIOD THAT REQUIRE THE HARDWARE TO BE RETRIEVED AND READ.   |
| 2.1.009 | 4117 | TECHNICAL DOCUMENTATION                                    | AC   | AC   | Vital Record. AC=UNTIL ELECTRONIC RECORDS ARE TRANSFERRED TO AND MADE USABLE IN A NEW HARDWARE OR SOFTWARE WITH NEW DOCUMENTATION OR THERE ARE NO ELECTRONIC RECORDS BEING RETAINED TO MEET AN APPROVED RETENTION PERIOD THAT REQUIRE THE DOCUMENTATION TO BE RETRIEVED AND READ. |
| 2.2.001 | 71   | SYSTEM MONITORING RECORDS                                  | AV   | AV   |   |
| 2.2.002 | 72   | COMPUTER UTILIZATION RECORDS                               | FE+3 | FE+3 |   |
| 2.2.004 | 75   | COMPUTER JOB SCHEDULES AND REPORTS                         | 3 MO | 3 MO | WILL BE RETAINED AT LEAST 3 MONTHS.   |
| 2.2.011 | 287  | DATA ENTRY BATCH CONTROL RECORDS                           | AC   | AC   | AC=WHEN RECONCILIATION CONFIRMED.   |
| 2.2.013 | 6023 | QUALITY ASSURANCE RECORDS                                  | AC   | AC   | AC=NO LONGER NEEDED AS AN AUDIT TRAIL FOR ANY RECORDS MODIFIED.   |
| 2.2.016 | 48   | SOFTWARE REGISTRATIONS, WARRANTIES, AND LICENSE AGREEMENTS | LA+3 | LA+3 | Vital Record.   |
| 3.1     | 4655 | IRM PERSONNEL ACTION FORMS                                 | 2    | 2    | INFORMATION TECHNOLOGY ONLY FORM.   |

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|--------------------------------------|------|---|------|--|------|--|--|--|--|
| 3.1                                  | 6746 | POSITIVE PERFORMANCE RECORDS (MAINTAINED BY SUPERVISORS)                              | AC   |  | AC   |  |  | AC=FIRST LEVEL REMINDER IS 3 MONTHS; SECOND LEVEL REMINDER IS 6 MONTHS WITH A COPY TO EMPLOYEE'S MASTER EMPLOYEE FILE; THIRD LEVEL REMINDER IS 12 MONTHS WITH A COPY TO EMPLOYEE'S MASTER EMPLOYEE FILE. BEGINING AUGUST 2005 SUPERVISORS USE Employee Development Notes IN CAPPS TO DOCUMENT SECOND AND THIRD LEVEL REMINDERS, BUT A PAPER COPY IS STILL FORWARDED TO HHSC HR FOR EMPLOYEE'S MASTER PERSONNEL FILE. |  |
| 3.1.006                              | 2950 | EMPLOYEE COUNSELING RECORDS   | AC+3 |  | AC+3 |  |  | AC=TERMINATION OF COUNSELING   |  |
| 3.1.014                              | 5025 | EMPLOYMENT SELECTIONS - INCLUDES INTERVIEW NOTES & DOCUMENTATION OF SELECTION PROCESS | 2    |  | 2    |  |  | Vital Record maintained by CAPPS only. Send all records to CAPPS. CAPPS HAS FULLY ASSUMED THIS FUNCTIONALITY AS OF SEPT 2006.  |  |
| 3.1.018                              | 1627 | GRIEVANCE RECORDS   | AC+2 |  | AC+2 |  |  | Vital Record maintained only by HHS-Civil Rights.. MAY CONTAIN CONFIDENTIAL DATA; AC=FINAL DECISION ON GRIEVANCE. BECAUSE OF CONSOLIDATION OF HUMAN RESOURCES IN HHS ENTERPRISE, MAINTAINED IN HHS-CIVIL RIGHTS  |  |
| 3.1.023                              | 903  | POSITION/JOB DESCRIPTIONS   | AC+4 |  | AC+4 |  |  | Vital Record. AC=UNTIL SUPERSEDED OR JOB ELIMINATED. AccessHR ASSUMED THIS FUNCTIONALITY IN AUGUST 2005.   |  |
| 3.1.027                              | 292  | TRAINING PORTFOLIOS AND CERTIFICATES  | AC+5 |  | AC+5 |  |  | AC=TERMINATION OF EMPLOYMENT.  |  |
| 3.1.037                              | 1635 | EMPLOYEE RECOGNITION RECORDS  | AC+5 |  | AC+5 |  |  | AC=TERMINATION OF EMPLOYMENT; FORWARD PRINTED COPY TO HHS MANAGER FOR HUMAN RESOURCE RECORDS FOR EMPLOYEE MASTER PERSONNEL FILE.   |  |
| 3.2                                  | 1568 | EMPLOYEE DATA INFORMATION   | FE+5 |  | FE+5 |  |  | REF# H216  |  |
| 3.2                                  | 1593 | PAYROLL WARRANT LISTS   | FE+5 |  | FE+5 |  |  |  |  |

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| 3.3.020                              | 1634             | WORK SCHEDULES & ASSIGNMENTS                        | 1                             |         | 1     |             |  |  |
| 3.3.025                              | 1591             | IT ADMINISTRATIVE HANDBOOK                          | US+3                          |         | US+3  |             |  |  |
| 3.4                                  | 1564             | TIME ACCOUNTING                                     | FE+3                          |         | FE+3  |             | Dovico Reporting System for Application Development Staff.   |  |
| 3.4                                  | 1569             | EMPLOYEE LEAVE INFORMATION                          | FE+3                          |         | FE+3  |             | REF# H229  |  |
| 4.5.006                              | 1562             | ANNUAL OPERATING BUDGETS                            | FE+3                          |         | FE+3  |             | REF# H213  |  |
| 5.1.001                              | 1567             | GRANTS CONTRACT DATA                                | AC                            | 7       | AC+7  |             | Vital Record. AC=EXPIRATION OR TERMINATION OF THE CONTRACT ACCORDING TO ITS TERMS..  | (120)05-537-074;<br>(500)10-537-555;<br>(599)05-537-307;<br>(550)10-537-554;<br>(642)05-537-498;<br><br>05-537-383; 05-537-483 |
| 5.2.004                              | 66               | SPACE MANAGEMENT REQUESTS                           | 1                             |         | 1     |             |  |  |
| 5.2.008                              | 74               | COMPUTER HARDWARE MAINTENANCE RECORDS               | LA+3                          |         | LA+3  |             |  |  |
| 5.2.009                              | 1587             | INVENTORY TRANSFERS                                 | FE+3                          |         | FE+3  |             | CONVENIENCE COPY   |  |
| 5.2.010                              | 5092             | EQUIPMENT MANUALS                                   | LA                            |         | LA    |             |  |  |
| 5.3                                  | 3674             | PROCUREMENT CARD PURCHASES SUPPORTING DOCUMENTATION | FE+3                          |         | FE+3  |             |  |  |
| 5.3.007                              | 4213             | BID DOCUMENTATION                                   | FE+3                          |         | FE+3  |             | INCLUDES BID REQUISITION, INVITATIONS TO BID, RFPs, BID SPECIFICATIONS, ACCEPTED AND REJECTED BIDS, BID TABULATIONS/EVALUATIONS. |  |
| 5.3.008                              | 1639             | BUDGET/PURCHASING RECORDS/LOGS                      | FE+3                          |         | FE+3  |             |  |  |

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830 - INFORMATION TECHNOLOGY SECTION

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| 5.4.012 | 81   | SECURITY CLEARANCES                     | AC+2 | AC+2 | Vital Record. (INCLUDES PASSWORDS & SIGNED STATEMENTS OR SIMILAR INSTRUMENTS OF ACCESS TO AGENCY FACILITIES, EQUIPMENT, OR AUTOMATED SYSTEMS) AC=UNTIL SUPERSEDED, DATE OF EXPIRATION, OR DATE OF TERMINATION, WHICHEVER SOONER. |
| 5.4.013 | 68   | DISASTER PREPAREDNESS AND RECOVERY PLAN | US   | US   | Vital Record.  |
| 5.5.004 | 1858 | SYSTEM ACTIVITY REPORTS                 | AV   | AV   |  |

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